

ATTORNEY OR PARTY WITHOUT ATTORNEY (Name, state bar number, and address): TELEPHONE NO.: _____ FAX NO. (Optional): _____ E-MAIL ADDRESS (Optional): _____ ATTORNEY FOR (Name): _____	FOR COURT USE ONLY
SUPERIOR COURT OF CALIFORNIA, COUNTY OF _____ STREET ADDRESS: _____ MAILING ADDRESS: _____ CITY AND ZIP CODE: _____ BRANCH NAME: _____	
CONSERVATORSHIP OF (Name): _____ PROPOSED CONSERVATEE _____	
CONFIDENTIAL CONSERVATOR SCREENING FORM Conservatorship of <input type="checkbox"/> Person <input type="checkbox"/> Estate <input type="checkbox"/> Limited Conservatorship	
CASE NUMBER: _____	

**Each proposed conservator shall submit this screening form with the conservatorship petition.
This form shall remain confidential.**

How This Form Will Be Used

This form is **confidential** and will not be a part of the public file in this case. You are required to complete and submit this form under rule 7.1050 of the California Rules of Court. The information you provide will be used by the court and by the persons and agencies designated by the court to assist the court in determining whether to appoint you as conservator. You **must** provide a response to each item.

1. a. **Proposed conservator (name):**
 b. Date of birth: _____
 c. Social security number: _____
 d. Driver's license number: _____ State: _____
 e. Telephone numbers: Home: _____ Work: _____ Other: _____

2. a. I am related to the proposed conservatee as (*specify relationship*): _____
 b. I have personally known the proposed conservatee for: _____ years, _____ months.

3. ☐ I was ☐ I was not nominated by ☐ the proposed conservatee ☐ the spouse of the proposed conservatee
☐ a parent of the proposed conservatee as conservator of the ☐ person ☐ estate.
(If nominated, provide documentation.)

4. a. ☐ I am the spouse of the proposed conservatee; and
☐ I have ☐ I have not filed for legal separation, dissolution of marriage, annulment, or adjudication of nullity of the marriage. *(If you have, explain in Attachment 4a.)*
 b. ☐ I am not the spouse of the proposed conservatee.

5. a. ☐ I do ☐ I do not owe money or have a financial obligation to the proposed conservatee. *(If you do, explain in Attachment 5a.)*
 b. The proposed conservatee ☐ does ☐ does not owe money or have a financial obligation to me. *(If the proposed conservatee does, explain in Attachment 5b.)*
 c. ☐ I am ☐ I am not an agent for a creditor of the proposed conservatee. *(If you are, explain in Attachment 5c.)*

6. ☐ I have ☐ I have not filed for bankruptcy protection within the last 10 years. *(If you have, explain in Attachment 6.)*

7. ☐ I have ☐ I have not been convicted of a felony or had a felony expunged from my record. *(If you have, explain in Attachment 7.)*

8. ☐ I have ☐ I have not been charged with, arrested for, or convicted of embezzlement, theft, or any other crime involving the taking of property. *(If you have, explain in Attachment 8.)*

(Continued on reverse)

CONFIDENTIAL

CONSERVATORSHIP OF (Name): _____	CASE NUMBER: _____
PROPOSED CONSERVATEE	

9. ☐ I have ☐ I have not been charged with, arrested for, or convicted of, a crime involving fraud, conspiracy, or misrepresentation of information. *(If you have, explain in Attachment 9.)*
10. ☐ I have ☐ I have not been charged with, arrested for, or convicted of any form of elder abuse or neglect. *(If you have, explain in Attachment 10.)*
11. ☐ I have ☐ I have not had a restraining order or protective order filed against me in the last 10 years. *(If you have, explain in Attachment 11.)*
12. ☐ I am ☐ I am not required to register as a sex offender under California Penal Code section 290. *(If you have, explain in Attachment 12.)*
13. ☐ I have ☐ I have not previously been appointed conservator, executor, or fiduciary in another proceeding. *(If you have, explain in Attachment 13.)*
14. ☐ I have ☐ I have not been removed or asked to resign as a conservator, guardian, executor, or fiduciary in any other case. *(If you have, explain in Attachment 14.)*
15. ☐ I have or may have ☐ I do not have an adverse interest that the court may consider to be a risk to, or to have an effect on, my ability to faithfully perform the duties of conservator. *(If you have or may have, explain in Attachment 15.)*
16. Do you or does any other person living in your home have a social worker or parole or probation officer assigned to him or her?
☐ Yes ☐ No *(If yes, explain in Attachment 16 and provide the name and address of each social worker, parole officer, or probation officer.)*

DECLARATION

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date:

(TYPE OR PRINT NAME)



(SIGNATURE OF PROPOSED CONSERVATOR*)

*Each proposed conservator must fill out and file a separate screening form.